

# About\_contact\_groups\_Content\_v1

The default groups available to you cover many of the groups that any rescue organization might want to have, such as adopters, donors, and volunteers. There is also a "Do Not Adopt" (DNA) default group. By adding names to this list, your volunteers can see the names that are flagged as those who should not adopt. If your organization is using the RescueGroups.org Website Service, you can also share this group of names with other RescueGroups.org organizations.

**Current View: Default**

Views: Default  

Name 

<u>Adopter</u>
<u>Board Member</u>
<u>Calls</u>
<u>Caretaker/Foster</u>
<u>Client</u>
<u>Community Member</u>
<u>Do Not Adopt</u>
<u>Donor</u>
<u>Member</u>
<u>Other Rescue</u>
<u>Potential Adopter</u>
<u>Professional Service</u>
<u>Retailer</u>
<u>Sponsor</u>
<u>Staff</u>
<u>Surrenderer</u>
<u>Transporter</u>
<u>Veterinarian</u>
<u>Volunteer</u>
<u>Walker</u>
<u>Contacts not in any group</u>

To be able to view contact groups and their members and add and remove contacts to a group, a volunteer must have the role of **Contacts Add**. For information about and instructions on adding and removing roles, see the User Guide section [User Login Accounts](#).

## Adding contacts to groups

To add a Contact to a group such as Do Not Adopt, Donors, or Volunteers:

1. Go to **Contacts > Contacts** List.
2. Locate the contact in the list and click the **Edit** icon.
3. Select the check box for the group to which you want to add the contact.
4. Click **Save**.



The Do Not Adopt group is a special group. It can be shared with other RescueGroups.org organizations, if you are signed up for the Website Service.

Organizations using the RescueGroups.org Website Service can choose to share their DNA list. If you would like to share your organization's DNA list with other RescueGroups.org organization, go to **Contacts > Settings**, and enable the option **Share your organization's Do Not Adopt list**.

**Contacts Settings**  
 « [Contacts](#) | [Settings & Options](#)

**General Settings**

Share your organization's Do Not Adopt list ☐ No ☒ Yes

## The Volunteer Contact Group is special!

Adding a contact to the Volunteer Contact Group will allow your team to select this specific contact in certain dropdown menus such as assigning submitted forms or sending contact reminders. We strongly suggest that you add any contact to the Volunteer Contact Group if they help you with your RescueGroups.org account management, such as managing submitted forms at your rescue.

- |               |   |   |
|---------------|---|---|
| <b>Groups</b> | <input type="checkbox"/> Adopter          | <input type="checkbox"/> Potential Adopter    |
|               | <input type="checkbox"/> Board Member     | <input type="checkbox"/> Professional Service |
|               | <input type="checkbox"/> Calls            | <input type="checkbox"/> Retailer             |
|               | <input type="checkbox"/> Caretaker/Foster | <input type="checkbox"/> Sponsor              |
|               | <input type="checkbox"/> Client           | <input type="checkbox"/> Staff                |
|               | <input type="checkbox"/> Community Member | <input type="checkbox"/> Surrenderer          |
|               | <input type="checkbox"/> Do Not Adopt     | <input type="checkbox"/> Transporter          |
|               | <input type="checkbox"/> Donor            | <input type="checkbox"/> Veterinarian         |
|               | <input type="checkbox"/> Member           | <input checked="" type="checkbox"/> Volunteer |
|               | <input type="checkbox"/> Other Rescue     | <input type="checkbox"/> Walker               |

## Adding a Contacts Group

To add a contact group, go to **Contacts > Groups**, and select the Add a Contact Group button at the top of the list. Simply identify the group by name, select whether it is a business or not, then save the group.

## Viewing Members of a Contact Group

You can view members of contact groups (and even export this information!) by:

1. Go to **Contacts Groups** page by going to **Contacts > Groups**
2. Find the Group you are looking for (ex. Adoptors). Hit the **number** under the **Members** column (Ex. 7)
3. Then you are taken to a table that displays all members of that group. You can use the **options dropdown** to export data if desired.

Example: If you look at the first example image below, if we wanted to see our Adopter group we would hit the 7. The second example image shows the 7 members of the group including links to their contact pages. The options dropdown at the left also allows you to export this to a spreadsheet program of choice if desired.

<b>Current View: Default</b>		Total: 25	
Views: <span>Default</span>		<span>0</span>	<span>Options...</span>
<u>Name</u>	<u>Members</u>		
<a href="#">Adopter</a>	<a href="#">7</a>		
<a href="#">Board Member</a>	<a href="#">0</a>		
<a href="#">Calls</a>	<a href="#">2</a>		

## Members of Adopter Group

« [Contacts](#) « [Groups](#)



Add a Contact to  
this Group

<b>Current View: Default</b>		Total: 7	
<span>Actions...</span>	Views: <span>Default</span>	<span>0</span>	<span>Options...</span>
<input type="checkbox"/> All	<u>Name</u>	<u>City</u>	<u>State</u>
<input type="checkbox"/>	<a href="#">Anonymous</a>		
<input type="checkbox"/>	<a href="#">Doe, Jane</a>	our city	VA
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

- Options...
- Show more
- Show fewer
- Show max
- Export to CSV
- Export to XLS
- Export to XML

## Removing or Deleting Members of a Contact Group

There are two ways to remove a contact from a group.

### Option 1: From the Contact Page

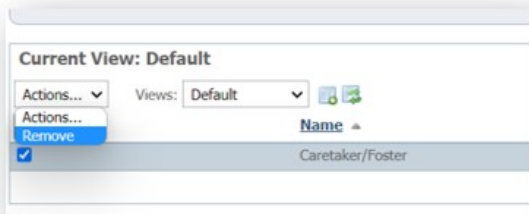
To remove a contact from a group first locate your contact, usually via a search. Then, using the blue links at the top find the **Groups** link. Select that link.

#### Demo Account

« [Contacts](#)

[Adoptions \(0\)](#)
[Calls \(0\)](#)
[Campaigns \(0\)](#)
[Submitted Forms \(4\)](#)
[Donations \(0\)](#)  
[Email History \(0\)](#)
[Files \(0\)](#)
[Fosters \(0\)](#)
[Groups \(1\)](#)
[Animal Intakes \(0\)](#)  
[Journal Entries \(0\)](#)
[Inventory Loaners \(0\)](#)
[Meet Requests \(0\)](#)
[Sponsorships \(0\)](#)  
[User Login Accounts \(1\)](#)
[Volunteer Calls Assigned \(0\)](#)
[Volunteer Calls Queues \(0\)](#)
[Volunteer Colony Caretakers \(0\)](#)
[Volunteer Journal \(0\)](#)  
[Volunteer Hours \(0\)](#)
[Waiting Lists \(0\)](#)

Check the box beside the group you want to remove from the contact and use the **Actions** Dropdown to select remove. Then click **OK** on the next popup.



## Option 2: From the Group list

Once on RescueGroups.org go to **Contacts > Groups** then **select the list you want to remove members from**. Click on the **Number** next to that group. This will pull up a page with members of that group. **Check the box beside the contact you want to remove** and use the **Actions** Dropdown to select remove. Then click **OK** on the next popup.

